

Weatherization Client File Checklist

All Applicable Forms Must Be Present in the Client File and Must Be in the Order Specified Below

Job number:	
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ODOC State QCI	QCI	Agency	Form #	Description	N/A
			Photos	Pre/During/Post Photo for each item listed on work plan Pre/Post/In-Progress Lead Safe Work Photos	Photos on Jump Drive , CD, or Electronic N/A
			Form 39	Client File Checklist	
			Form 22	Wx Client Application	
			Form 26 or 27	DOE or DHS BWR	
			Printout	NEAT/MHEA Audit	
			Printout	NEAT/MHEA Input Report [for QA visits and H&S Justification]	No H&S Justification or QA visit Required N/A
			Receipts	Receipts and Invoices	
			Form 31	Hazardous Materials Disposal Verification	No Hazardous Materials Disposed N/A
			Form 28 A or B	Energy Audit Data Collection Form - A - Site Built, B – Mobile	
			Copy	Work Order and any Change Orders	
			Copy	Target Blower Door Spreadsheet	
			Form 44	Quality Control Report	
			Form 45	Energy Audit Checklist	
			Form 35	Client Satisfaction Form	
			Form 48	Warranties Verification Signature Page	No Warranties N/A
			Form 23	WX Needs Assessment Priority	
			Income	Client Income Documentation	
			Form 30	Occupant Agreement	
			Form 29	Rental Agreement	Home owned by client N/A
			Form 34	Notarized Certification of Zero Income	All occupants 18yrs+ have income N/A
			Form 36	Radon Consent Form	Used form provided with Form 22 N/A
			Pre-ASHRAE	Pre Wx Printout from Residential Energy Dynamics	
			Post-ASHRAE	Post Wx Printout from Residential Energy Dynamics	
			Form 42	Test Kit Documentation	Home newer than 1978 N/A
			Form 43	Renovation Recordkeeping Checklist	Home newer than 1978 or lead testing negative/not needed N/A
			Form 40	Certified Renovator On The Job Progress Log	Home newer than 1978 or lead testing negative/not needed N/A
			Form 25	Client H&S Education Checklist w/Signature	
			Attachment 35	Renovate Right Client Signature	Home newer than 1978 or lead testing negative/not needed N/A
			Form 32	Mold Disclosure	No Mold suspected or identified N/A
			Form 46	Insulation Summary Sheet w/attached Insulation Brand Chart	Insulation not installed N/A
			Copy	Copy of Certified Renovator Certification	Home newer than 1978 or lead testing negative/not needed N/A
			Printout	Third Party Verification of Year Home was Built	
			Section 106 Review Documentation	SHPO Response indicating that no historic properties are affected. [optional documentation, not required - Form 37, Cover Letter]	Home is less than 45 years or work falls within scope of PA N/A
			Readiness Funding	Form 33, Procurement Documentation, Materials Receipts	See ODOC WPN 22-6 for further documentation
			Other Agency Forms or Correspondence	Not Required	